Regional Movers Index

September 2025 Quarter Report

Powered by:

Commonwealth Bank

REGIONAL AUSTRALIA INSTITUTE

What is the Regional Movers Index?

The **Regional Movers Index** presents fresh analysis of movements between Australia's capital cities and regions.

The **Index** is a partnership between Commonwealth Bank of Australia (CBA) and the Regional Australia Institute (RAI), powered by analysis of proprietary data to create an up-to-date and granular picture of a large sample of relocations.

Released quarterly, the RMI was established at the height of the COVID-19 pandemic to track the movement of capital city people to the regions. The RMI publication also highlighted that people in regional areas were tending to stay in regions to avoid those severe capital-city lockdowns. Housing and cost of living pressures are continuing to influence the patterns of movement within Australia, and the RMI publication has been refined to focus on the net migration flows to give current information on the extent to which regional populations are either growing or shrinking. See pp 17-19 in the appendix for details on the various revisions to the methodology that focuses on these net flows.

- The **Index** is powered by CBA data from relocations amongst more than 14.6 million of its customers.
- Quarterly and annual changes are presented in the **Index**.
- This **Index** is an invaluable resource for both the public and private sectors. By tracking people's movements it enables early identification of growth trends, and flags places emerging as hotspots needing fresh thinking on housing and infrastructure.

Note this report incorporates revisions to the March and June 2025 quarter RMI results (see [insert RAI link and CBA link housing RMI reports]).

See Appendix A1 for definitions and methodology.

Regional Movers Index

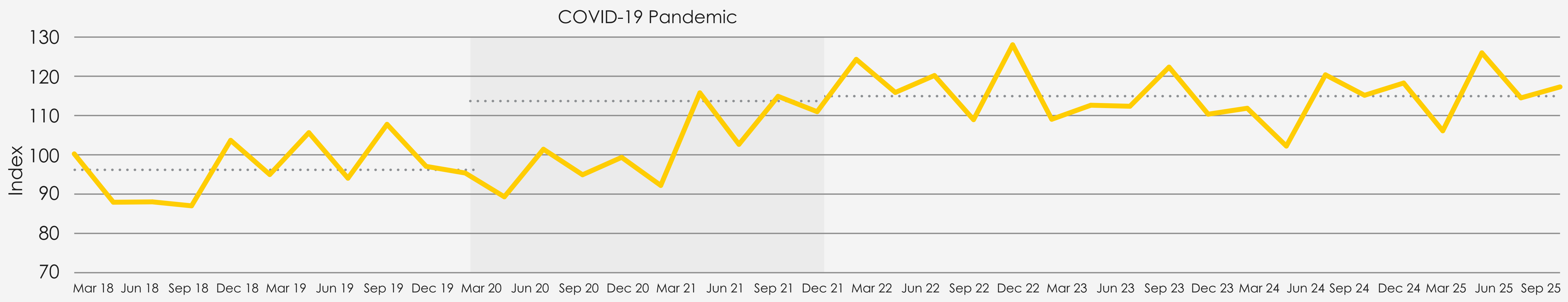
Uptick in metro movers to regional Australia

The number of people relocating from capital cities to regional Australia rose by 2.5 per cent in the September 2025 quarter. This latest number of city people making a regional move is just shy of the level recorded a year earlier, down by 0.8 per cent.

Overall, internal migration from Australia's capitals to the regions remains elevated and continues to outstrip the migration flows in the opposite direction (from Australia's regions to the capitals). During the September 2025 quarter, capital-to-region migration accounted for 11.5 per cent of all major relocations, compared with 8.4 per cent for region-to-capital moves.

See pg 19, Note on methodology: definitions of inter-regional, inter-capital, region-to-capital and capital- region migration, which discusses the shares under this breakdown of total major relocations.

Regional Movers Index: Population flows from capital cities to regional Australia



Index = 100, March 2016

Breakdown of major total relocations
September Quarter 2025

From \ To	Regional Australia	Capital Cities
Regional Australia	12.0%	8.4%
Capital Cities	11.5%	68.1%

Net Internal Migration to Regional Australia

Sustained growth in net internal migration to regional Australia

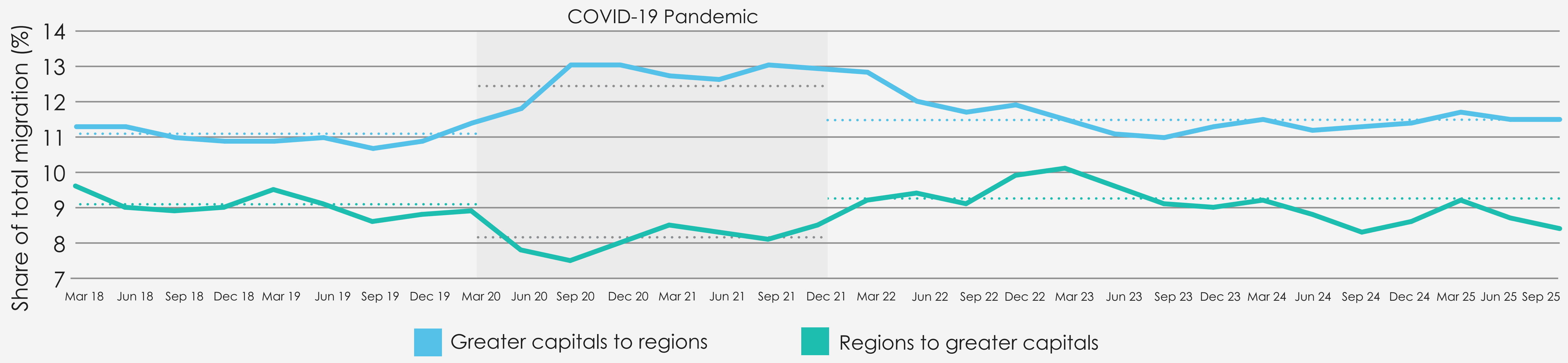
In the September 2025 quarter, capital city people moving to Australia's regions outnumbered regional people making a move in the opposite direction by 36 per cent.

Over the post-COVID period, capital-region migration has retained a fairly steady share of total relocations, at around 11.5 per cent, including in the latest quarter. For migration in the other direction, its share of total relocations has been declining since 2023; from a 10.1 per cent share in the March 2023 quarter, down to an 8.4 per cent share in the September 2025 quarter.

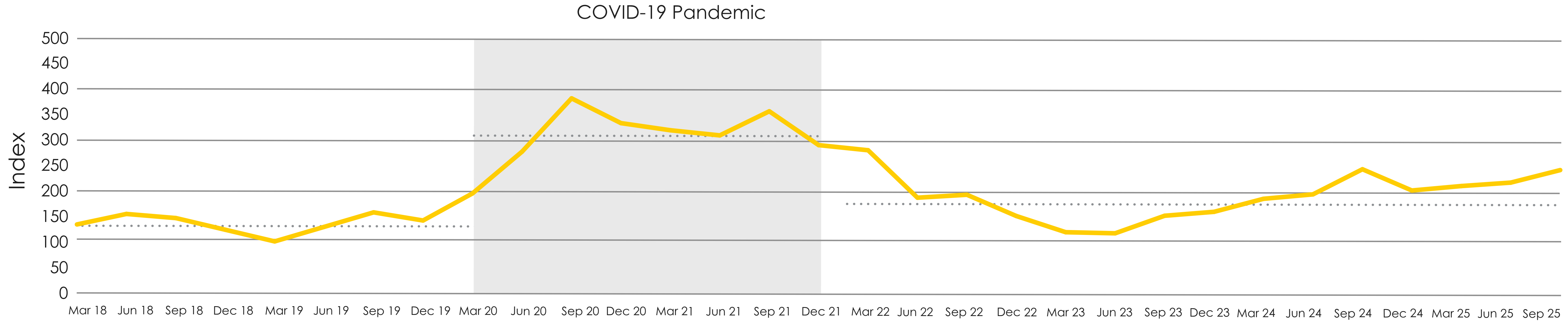
This trend is driving higher net migration to regions. The number of people added to regional Australia's population continues to rise, indicated by the net migration index. The net number of people moving to Australia's regions increased by 11.8 per cent in the September 2025 quarter. The latest level is just shy (by 0.3 per cent) of the 2-year high recorded a year earlier.

Net internal migration is a key driver of population growth in Australia's regions. After reaching record levels during the height of the pandemic, sustained growth has returned over the past two years. Planning and investment to accommodate this growth is a key challenge for governments, industry and communities.

Regional migration - share of all internal migration



Net migration to regional areas – indexed



Index = 100, March 2016

Migration Patterns By State

Smaller states see a growing share of regional migration

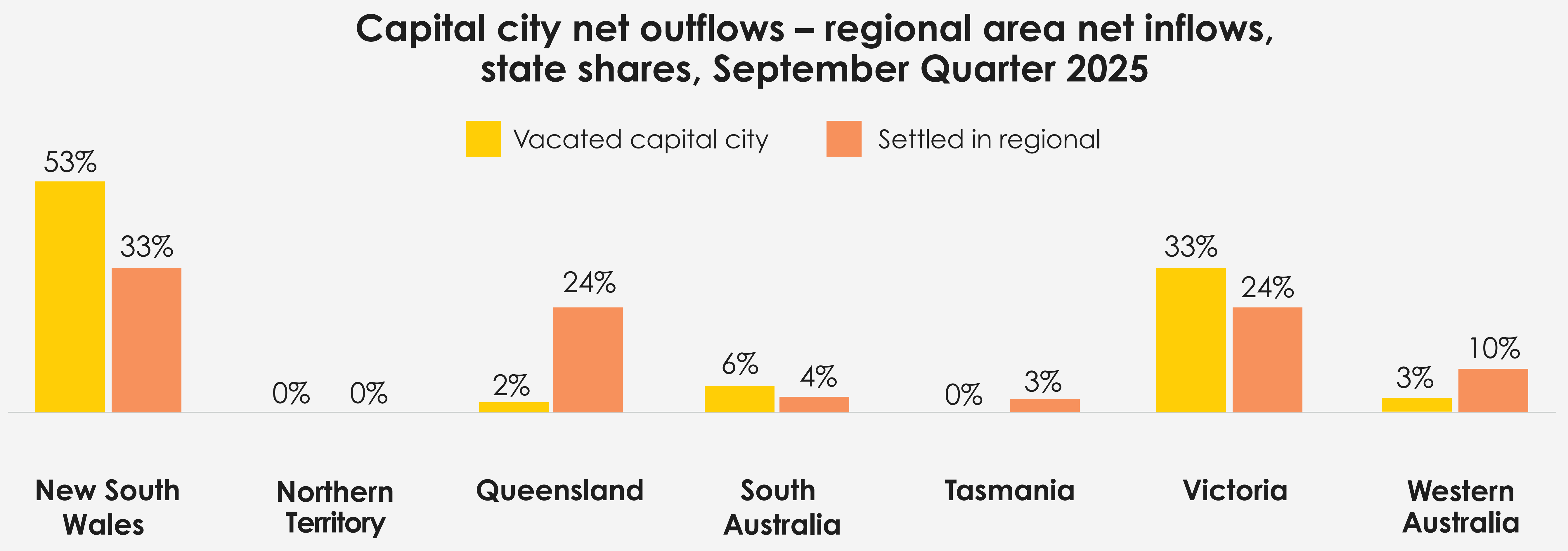
Australia's two major capitals continue to be the major sources of net outflows to Australia's regions. In the September 2025 quarter, Sydneysiders accounted for 53 per cent of the net outflow from across all the capital cities, while Melburnians contributed 33 per cent.

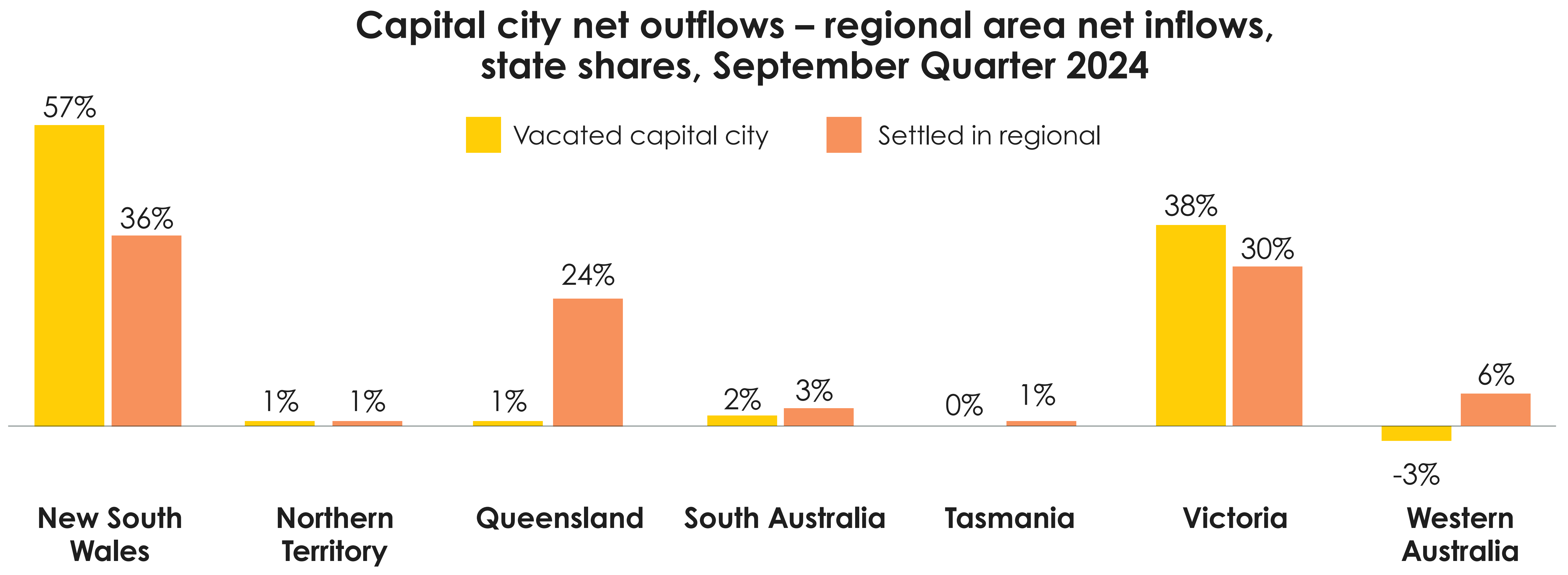
While the net outflows from the remaining capitals is much smaller, these have grown significantly. Compared with a year earlier:

- Brisbane increased its share from 1 per cent to 2 per cent
- Adelaide rose from 2 per cent to 6 per cent
- Perth shifted from receiving net inflows to recording a net outflow, now accounting for 3 per cent of the total.

The net migration from capitals to regional areas continues to flow predominantly into the regions of the mainland eastern states.

Regional WA's share of net inflows rose to 10 per cent in the September 2025 quarter, up from 6 per cent a year earlier, while Tasmania's share increased to 3 per cent, compared with 1 per cent previously.





Regional Hotspots by Share

Top Five LGAs: the largest net internal migration inflows

The Sunshine Coast and Greater Geelong continue to attract the largest net migration to regional areas, with the top 5 regions largely unchanged.

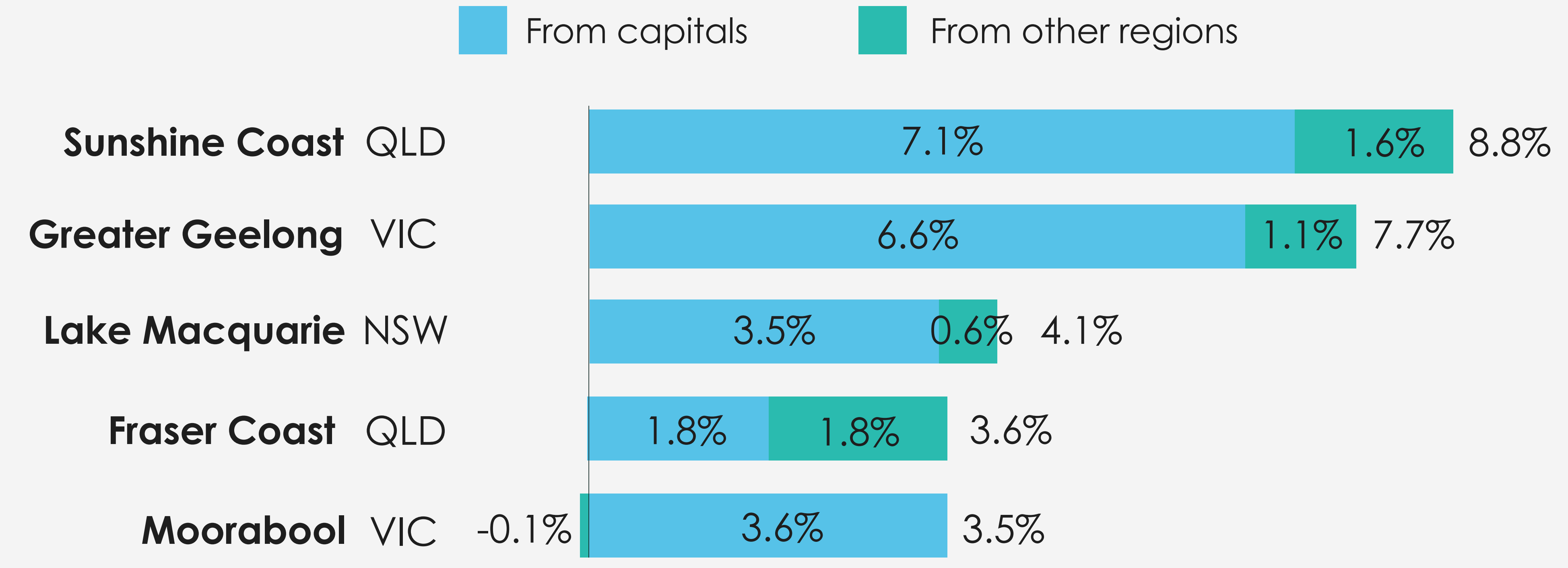
The Sunshine Coast remains the country's top regional migration hotspot, attracting the largest numbers, in net terms, among all of Australia's regions.

For each of these net migration hotspots, the bulk of the net migration is coming from capital cities, rather than from other regions. Moorabool lost population to other regions, while the Fraser Coast stands out as an exception – the source of its net migration in the 12 months to September 2025 is split evenly between capitals and regions.

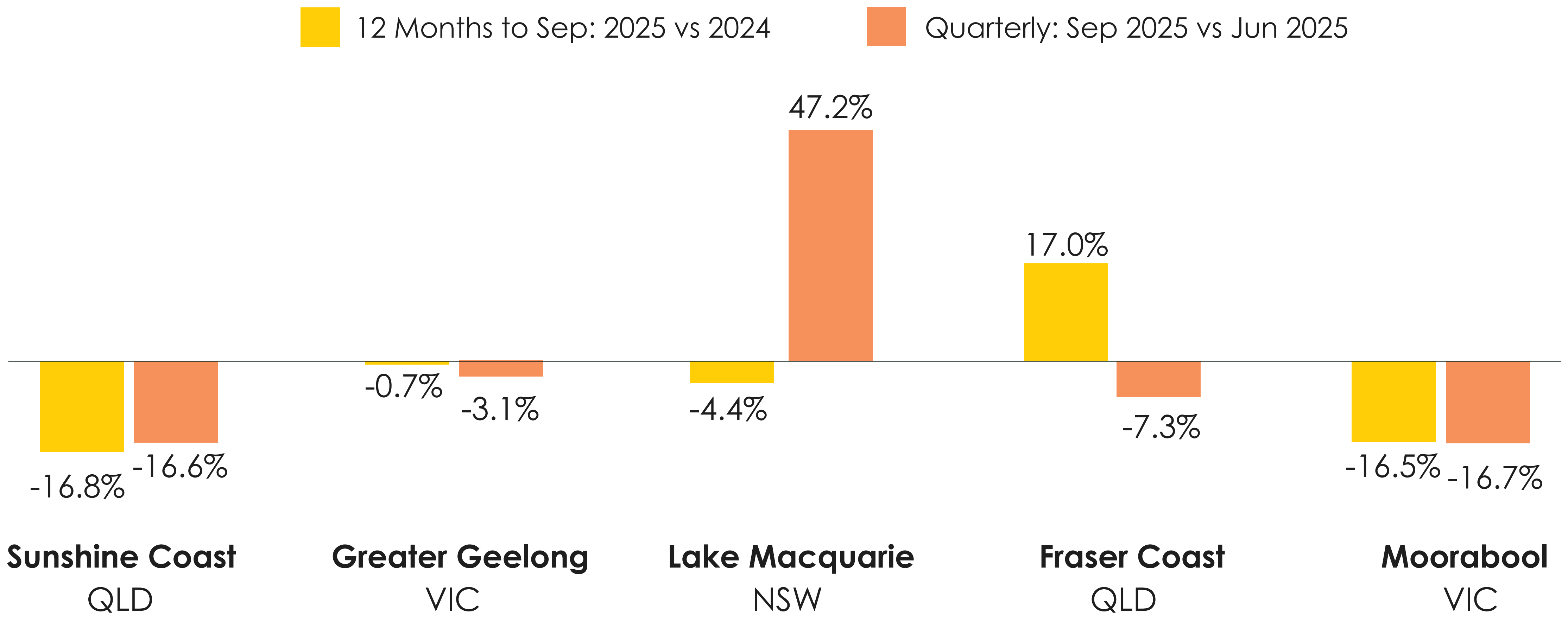
Although these LGAs experienced the highest net migration during the 12 months to September 2025, the latest level of net migration is lower than what was recorded in the previous 12 months for each of the LGAs.

Net internal migration is: net flows (inflows – outflows) from capitals to regions + net flows (inflows – outflows) from region to region.

Top Five LGAs by **share of total net internal migration** to regional Australia, 12 months to Sep 2025



Changes in **total net internal migration** inflows to Top Five LGAs



Regional Hotspots by Growth

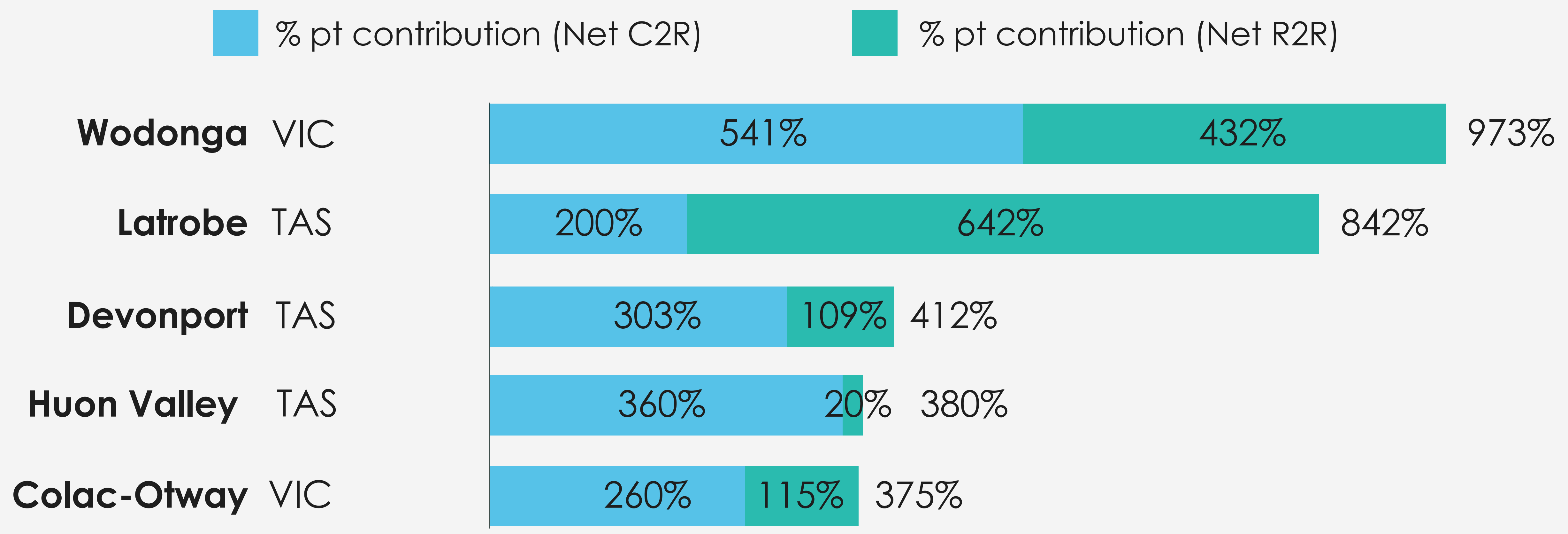
Growth hotspots in cool country

Growth hotspots of net internal migration during the 12 months to September 2025 were distinctly located in the southern reaches of the country, with Tasmanian regions featuring prominently.

From a low base level of net internal migration, Wodonga in Victoria recorded the strongest growth in net migration in the 12 months to September 2025. The growth was driven fairly evenly from both capitals and other regions.

The growth in net internal migration to the Latrobe region in Tasmania's north was driven by significant growth in net migration from other regions. Rounding out the top five growth was neighbouring Devonport, the Huon Valley in Tasmania's south and the Colac-Otway LGA in Victoria's south. For each of these LGAs, it has been net migration from capital cities (rather than other regions) driving the overall growth in net migration.

Top Five LGAs **by annual growth in total net internal migration inflows**
12 months to Sep 2025 vs 12 months to Sep 2024, % change



Most Popular Places for Capital City People

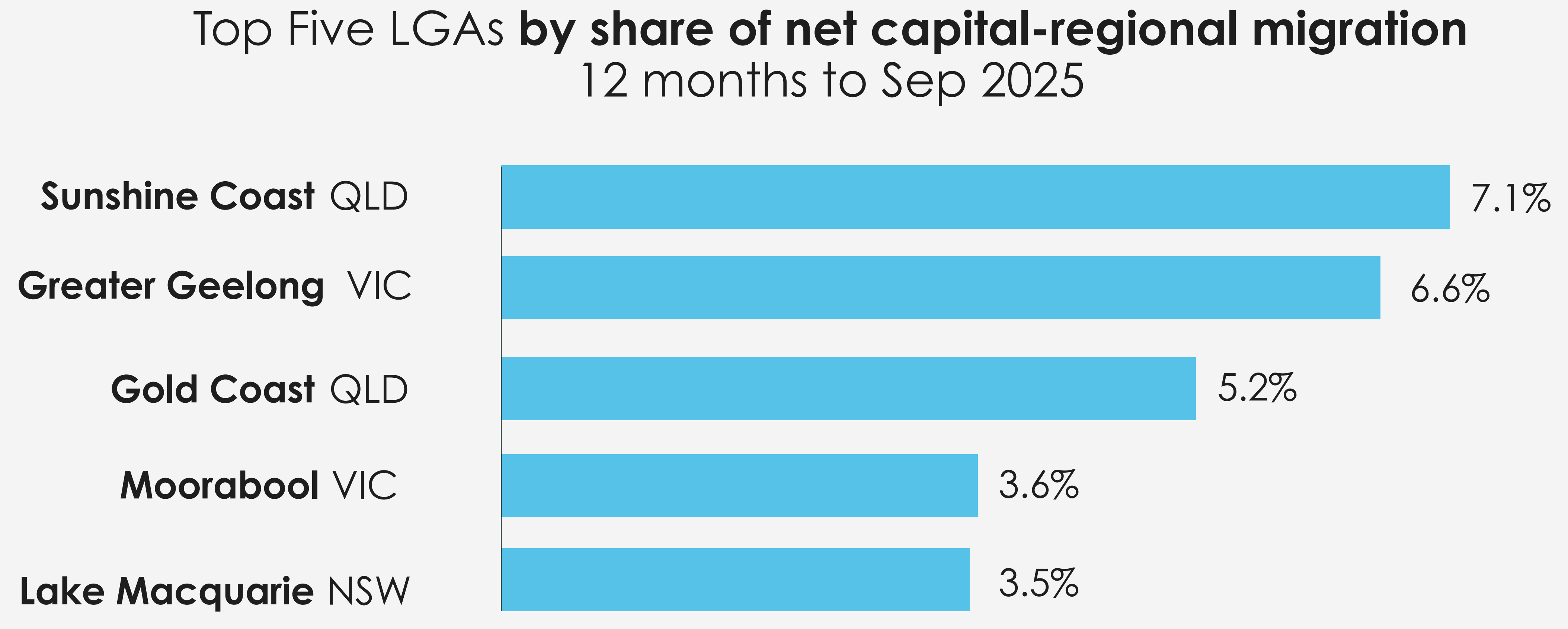
Top Five LGAs: largest net inflows from capitals

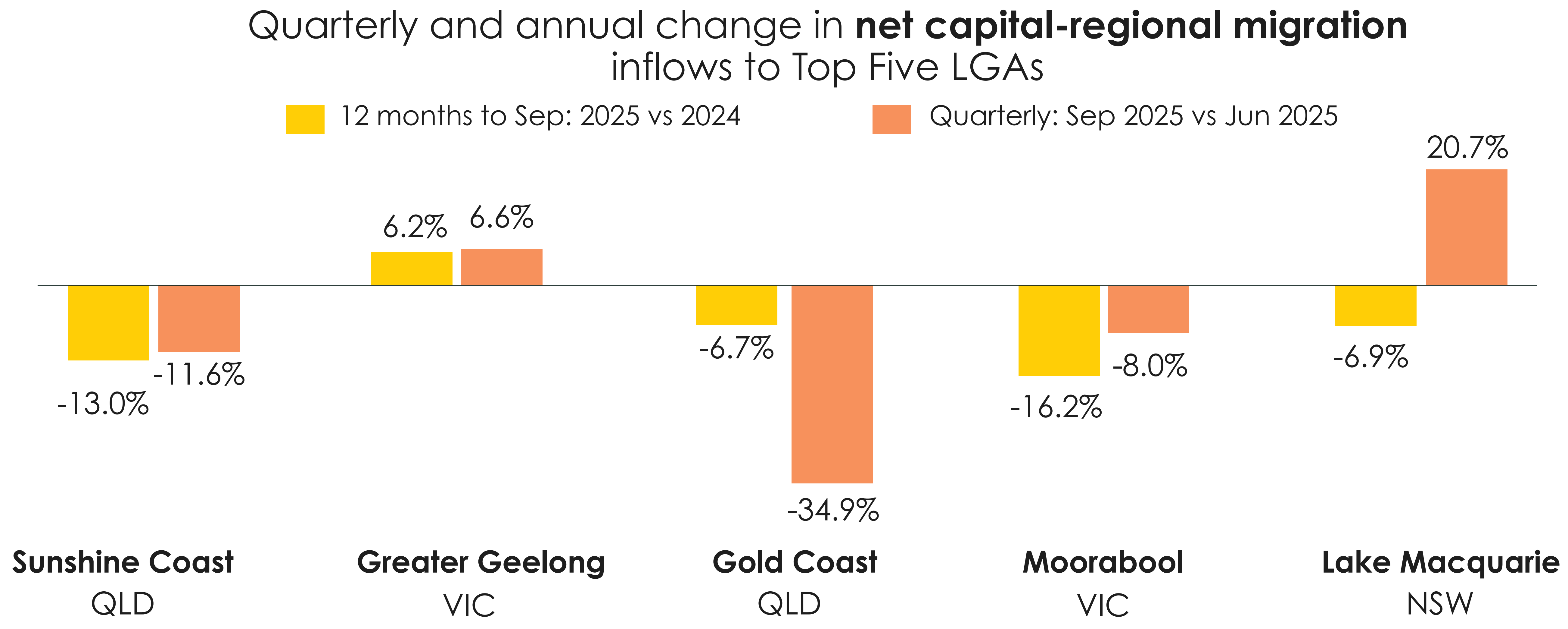
These regions across the country attracted the largest share of population movement from capitals, in net terms.

The Sunshine Coast retained its number one position, accounting for 7.1 per cent of the net migration from capitals to regions; Greater Geelong came in at second place, attracting in 6.6 per cent of net capital to region migration.

The Gold Coast, Moorabool and Lake Macquarie round out the top five positions, accounting for 5.2 per cent, 3.6 per cent and 3.5 per cent, respectively, of the net migration from capitals to regions.

Net migration inflows from capitals are: inflows from capitals minus outflows to capitals.





Increasingly Popular Places for Capital City People

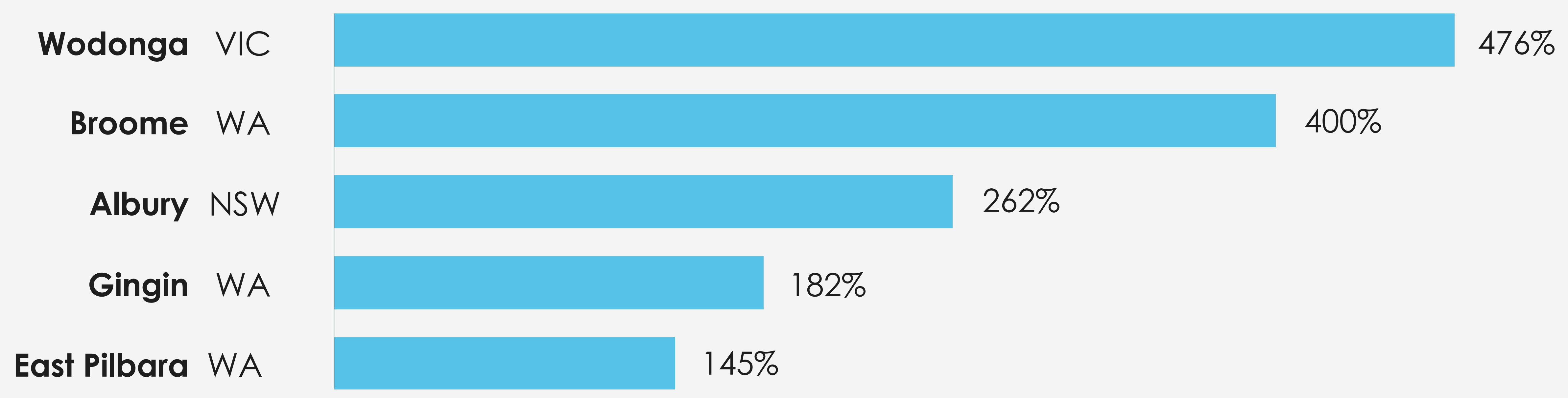
Top Five LGAs: greatest growth in net inflows from capitals

Hotspots for growth in net inflows from capitals were widely distributed across the country.

The Victorian border town of Wodonga has come hot on the heels of its New South Wales neighbour, Albury, taking the number one spot for the greatest growth in net migration from capitals during the 12 months to September 2025. Albury, which held the top spot in the previous quarter, slipped to third place in this update.

The remaining LGAs experiencing the strongest growth in net capital-regional migration in the latest 12 months were all in Western Australia; Broome taking second place and Gingin and East Pilbara rounding out the top five.

Top Five LGAs **by annual growth in net capital-regional migration**
12 months to Sep 2025 vs 12 months to Sep 2024, % change



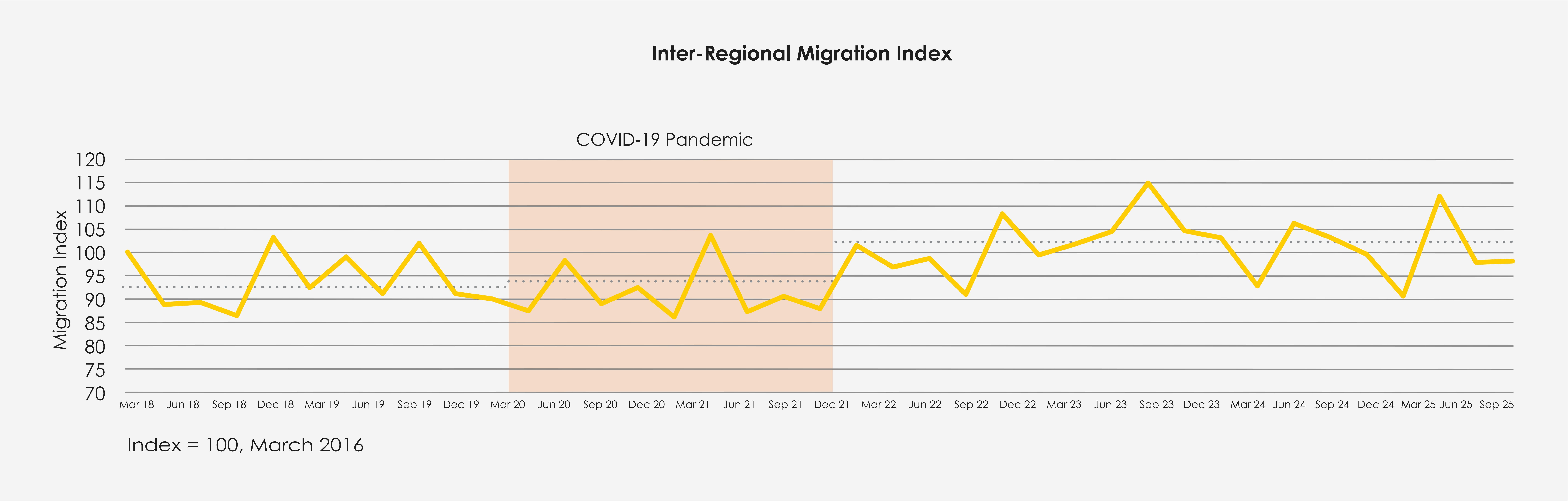
Inter-Regional Migration

Declining trend emerges

Inter-regional migration remained broadly steady (up by 0.3 per cent) in the September 2025 quarter.

This steady result comes after a decline in the June quarter.

The latest level of inter-regional migration is 1.4 per cent lower than a year earlier. This continues an overall emerging trend of declining regional mobility in recent quarters; seven of the past eight quarters have recorded annual declines in inter-regional migration.



Most Popular Places for Regional People

Top Five LGAs: largest net inflows from regions

While this publication mostly focuses on migration flows between capitals and regions, it is also the case that some regions across the country are gaining significant population from other regions, in net terms. Many of these regions also receive strong net inflows from capital cities.

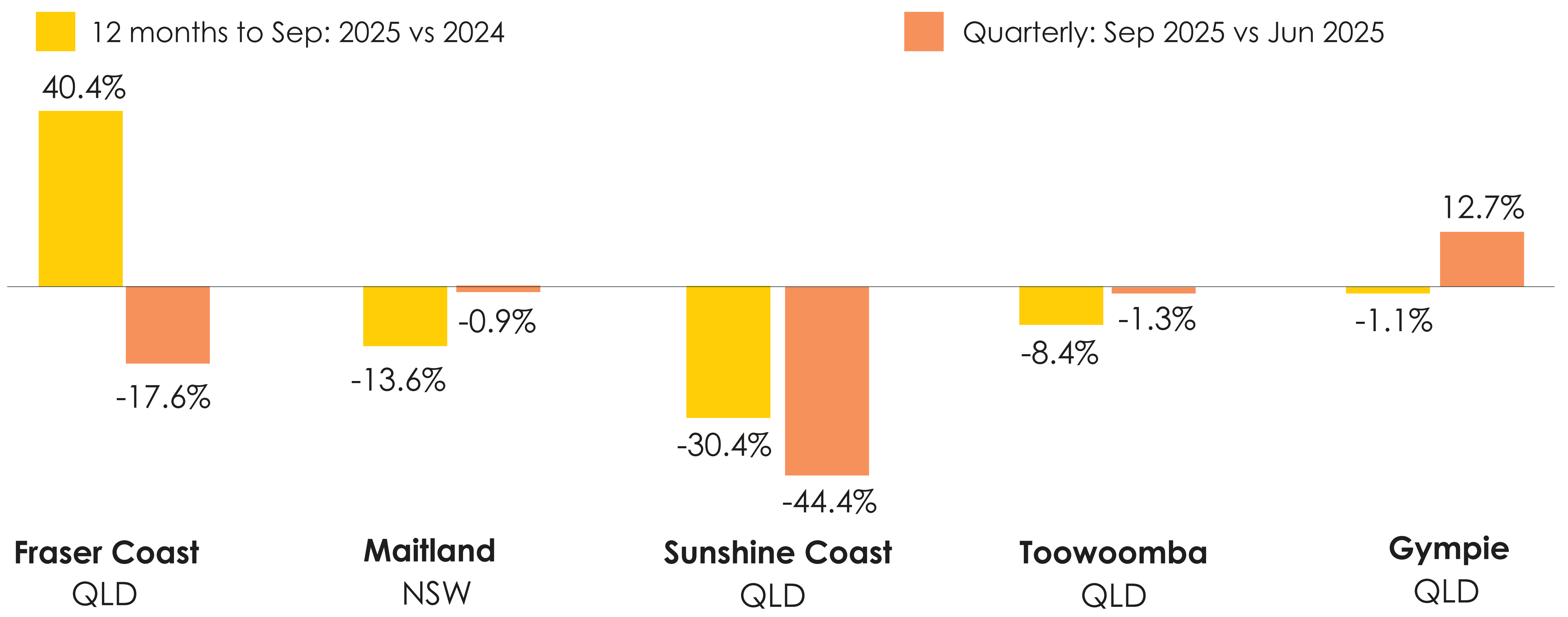
In the 12 months to September 2025, Queensland's regions attracted the greatest number of net inter-regional migration, with Fraser Coast topping the list.

Maitland in New South Wales attracted the second largest number of net inflows from other regions, with Sunshine Coast, Toowoomba and Gympie rounding out the top five places as the most popular for regional people relocating to other regions.

It should be noted that the net migration inflows from regions are: inflows to a region minus the outflow to other regions.

Top Five LGAs **by share of net regional-regional migration**
12 months to Sep 2025

Quarterly and annual change in **net regional-regional migration** inflows to Top Five LGAs



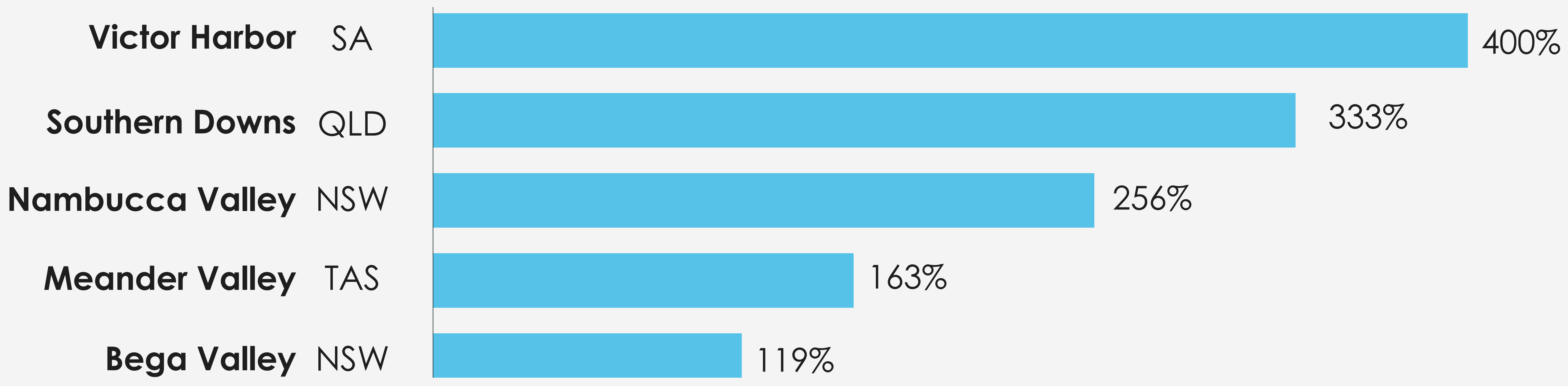
Increasingly Popular Places for Regional People

Top Five LGAs: greatest growth in net inflows from regions

The top five LGAs with the highest rates of growth in net migration from other regions were spread across South Australia, Queensland, New South Wales and Tasmania.

Taking out the top spot was South Australia's Victor Harbor, where the number of people arriving from other regions in the 12 months to September 2025 was 5 times greater than a year earlier.

Southern Downs in Queensland ranked second, followed by Nambucca Valley in New South Wales, Meander Valley in Tasmania and Bega Valley in New South Wales – rounding out the top five places experiencing the strongest growth in net migration from other regions during the last 12 months.



Appendix

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A1: Regional Movers Index
Methodology Notes

1 CBA-RAI Regional Movers Index is defined as movement of CBA customers from capital cities to regional areas (see A1.2). Index = 100 March 2016 quarter.

2 Customer movement or population flows refers to CBA customers changing their address as stored in CBA technological systems. Customers must have stayed at one address for 6 months (prior to moving) to be counted.

3 Capital cities/Regional areas defined through ABS 1270.0.55.001 GCCSA boundaries. Capital cities go by the GCCSA_NAMES of: Greater Sydney, Greater Melbourne, Greater Brisbane, Greater Adelaide, Greater Perth, Greater Hobart, Greater Darwin and Australian Capital Territory. Regional areas go by the GCCSA_NAMES of: Rest of NSW, Rest of Vic, Rest of QLD, Rest of SA, Rest of TAS, Rest of NT. Offshore and 'No usual address' GCCSA_NAMES excluded. ACT has no regional areas.

4 Relocations within capitals and within regions are those that are across different LGAs. That is, relocations WITHIN a given LGA are not considered or counted as a relocation. See p 19, Note on methodology: definitions of inter-regional, inter-capital, region-capital and capital-region migration

5 The Net regional migration index is calculated as movement from capital areas to regional less movement from regional areas to capital cities. Index = 100, March 2016 quarter.

6 LGAs are defined through ABS 1270.0.55.003 ASGS Volume 3 – Non ABS Structures.

7 To be listed on the RMI appendix – and considered for the various Top 5 rankings – an LGA must:
• Have had net internal migration inflows in last 12 months to September 2025 of 50 or more people.
• Have had a base of net internal migration, net capital-region or net region-region inflows in last 12 months to September 2024 of more than 10 people. This is to filter out significant outlier results associated with changes in small numbers. Significant outlier growth rates are not published or ranked.

8 14 LGAs have a percentage of their constituency defined as Capital and the other percentage defined as Regional. These LGAs include Scenic Rim (R), Light (RegC), Barossa (DC), Yarra Ranges (S), Lockyer Valley (R), Kingborough (M), Murrindindi (S), Derwent Valley (M), Murray (S), Mallala (DC), Moorabool (S), Mitchell (S), Macedon Ranges (S), Unincorporated NT.]

9 The proportion of CBA customers in each state as percentage of total customers is representative of overall Australian population (ABS National, state and territory population released 18th June 2021 for December 2020 reference period).

10 The Business Banking business unit of the Commonwealth Bank of Australia ABN 48 123 123 124 AFSL 234945 (Bank) has prepared this report. References to the "Group" are to the Bank and its subsidiaries (including Commonwealth Securities Limited ABN 60 067 254 300 AFSL 238814, Commonwealth Australia Securities LLC and CBA Europe Ltd) and includes the directors, employees and representatives of the Bank and its subsidiaries.

A2: All LGAs
Share of Migration, Changes in Total Net Internal Migration

LGA	State	Share of TOTAL NIM (%)	Share of NET C2R Migration (%)	Share* of NET R2R Migration (%)	12 months to Sep 2025 vs 12 months to Sep 2024 (%)
Sunshine Coast	QLD	**8.8%**	7.1%	5.2%	-16.8%
Greater Geelong	VIC	**7.7%**	6.6%	3.5%	-0.7%
Lake Macquarie	NSW	**4.1%**	3.5%	1.8%	-4.4%
Fraser Coast	QLD	**3.6%**	1.7%	5.8%	17.0%
Moorabool	VIC	**3.5%**	3.6%	-0.4%	-16.5%
Maitland	NSW	**3.3%**	1.6%	5.3%	6.2%
Greater Bendigo	VIC	**2.8%**	1.8%	3.2%	78.0%
Shellharbour	NSW	**2.7%**	1.5%	3.9%	30.3%
Port Macquarie-Hastings	NSW	**2.4%**	1.7%	2.2%	11.9%
Cessnock	NSW	**2.4%**	1.4%	3.1%	-5.8%
Mid-Coast	NSW	**2.3%**	2.2%	0.5%	10.2%
Ballarat	VIC	**2.3%**	1.8%	1.4%	-2.2%
Shoalhaven	NSW	**2.2%**	2.1%	0.3%	-1.5%
Busselton	WA	**1.9%**	1.4%	1.6%	28.5%
Toowoomba	QLD	**1.8%**	0.5%	4.2%	36.7%
Gympie	QLD	**1.8%**	0.5%	4.1%	-12.2%
Bass Coast	VIC	**1.7%**	1.6%	0.5%	10.3%
Tweed	NSW	**1.7%**	1.2%	1.4%	-6.7%
Townsville	QLD	**1.7%**	0.9%	2.5%	-7.2%
Port Stephens	NSW	**1.7%**	1.1%	1.7%	-18.0%
Gold Coast	QLD	**1.5%**	5.2%	-11.8%	-37.1%

LGA	State	Share of TOTAL NIM (%)	Share of NET C2R Migration (%)	Share* of NET R2R Migration (%)	12 months to Sep 2025 vs 12 months to Sep 2024 (%)
Augusta-Margaret River	WA	**1.3%**	0.9%	1.2%	32.2%
East Gippsland	VIC	**1.3%**	1.1%	0.5%	37.8%
Bundaberg	QLD	**1.2%**	0.8%	1.2%	-22.1%
Snowy Valleys	NSW	**1.2%**	1.3%	-0.2%	66.5%
Ballina	NSW	**1.2%**	0.7%	1.6%	-0.9%
Livingstone	QLD	**1.2%**	0.5%	2.2%	-13.0%
Albury	NSW	**1.2%**	0.9%	0.9%	56.5%
Noosa	QLD	**1.1%**	1.4%	-0.9%	83.8%
Alexandrina	SA	**1.0%**	1.0%	0.3%	52.2%
Baw Baw	VIC	**1.0%**	1.4%	-1.3%	-51.6%
Surf Coast	VIC	**0.9%**	1.1%	-0.4%	11.4%
Wingecarribee	NSW	**0.9%**	1.5%	-1.8%	-2.7%
Latrobe	VIC	**0.9%**	0.7%	0.6%	21.1%
Wodonga	VIC	**0.9%**	0.5%	1.1%	972.7%
Queanbeyan-Palerang Regional	NSW	**0.8%**	1.1%	-1.2%	-1.0%
South Burnett	QLD	**0.7%**	0.6%	0.6%	55.8%
Victor Harbor	SA	**0.7%**	0.5%	0.8%	40.6%
Southern Downs	QLD	**0.7%**	0.5%	0.6%	37.3%
Scenic Rim	QLD	**0.7%**	0.2%	1.5%	-14.7%
Bega Valley	NSW	**0.7%**	0.5%	0.7%	-2.1%
Albany	WA	**0.7%**	0.4%	0.7%	-10.6%

* a negative share of Net Regional-Regional Migration indicates the LGA experienced a net outflow of people to other regions; the percentage listed is the percent this LGA's outflows represents out of the sum of outflows from all LGAs that experienced a net outflow of people to other regions

* a positive share of Net Regional-Regional Migration indicates the LGA experienced a net inflow of people from other regions; the percentage listed is the percent this LGA's outflows represents out of the sum of inflows to all LGAs that experienced a net inflow of people from other regions. See p 19 on the Appendix A4 for definitions and methodology.

A2: All LGAs

Share of Migration, Changes in Total Net Internal Migration

LGA	State	Share of TOTAL NIM (%)	Share of NET C2R Migration (%)	Share* of NET R2R Migration (%)	12 months to Sep 2025 vs 12 months to Sep 2024 (%)
Moira	VIC	**0.7%**	0.6%	0.2%	13.5%
Greater Geraldton	WA	**0.6%**	0.3%	1.1%	3.7%
Devonport	TAS	**0.6%**	0.3%	1.0%	412.1%
Orange	NSW	**0.6%**	0.9%	-0.8%	12.5%
Eurobodalla	NSW	**0.6%**	0.6%	-0.1%	10.3%
Goulburn Mulwaree	NSW	**0.6%**	0.4%	0.5%	44.3%
Hindmarsh	VIC	**0.6%**	0.7%	-0.5%	102.7%
Gladstone	QLD	**0.6%**	0.1%	1.3%	-48.8%
Whitsunday	QLD	**0.5%**	0.6%	-0.3%	-50.2%
Murray River	NSW	**0.5%**	0.3%	0.8%	4.5%
Northam	WA	**0.5%**	0.4%	0.5%	39.2%
Capel	WA	**0.5%**	0.2%	1.0%	20.7%
Mackay	QLD	**0.5%**	0.2%	0.9%	-70.2%
Byron	NSW	**0.5%**	1.2%	-2.2%	-46.7%
Harvey	WA	**0.5%**	0.3%	0.6%	-30.7%
Nambucca Valley	NSW	**0.4%**	0.2%	0.8%	65.3%
Copper Coast	SA	**0.4%**	0.3%	0.4%	296.7%
Golden Plains	VIC	**0.4%**	0.2%	0.7%	-35.0%
Latrobe	TAS	**0.4%**	0.1%	1.0%	841.7%
Bunbury	WA	**0.4%**	0.3%	0.4%	9.8%
Strathbogie	VIC	**0.4%**	0.3%	0.2%	-11.2%

LGA	State	Share of TOTAL NIM (%)	Share of NET C2R Migration (%)	Share* of NET R2R Migration (%)	12 months to Sep 2025 vs 12 months to Sep 2024 (%)
Richmond Valley	NSW	**0.4%**	0.1%	0.8%	20.2%
Yass Valley	NSW	**0.4%**	0.5%	-0.2%	0.0%
Lithgow	NSW	**0.4%**	0.6%	-0.7%	215.2%
Benalla	VIC	**0.4%**	0.3%	0.4%	153.7%
East Pilbara	WA	**0.4%**	0.3%	0.1%	205.9%
Wellington	VIC	**0.4%**	0.4%	-0.1%	-18.9%
Ceduna	SA	**0.4%**	0.3%	0.1%	48.5%
Rockhampton	QLD	**0.4%**	0.2%	0.5%	185.3%
Tablelands	QLD	**0.4%**	0.0%	1.0%	14.1%
Huon Valley	TAS	**0.4%**	0.3%	0.3%	380.0%
Meander Valley	TAS	**0.4%**	0.1%	0.7%	118.2%
Mid Murray	SA	**0.4%**	0.2%	0.3%	45.5%
Clarence Valley	NSW	**0.4%**	0.1%	0.7%	-73.2%
Colac-Otway	VIC	**0.4%**	0.4%	-0.2%	375.0%
Gingin	WA	**0.4%**	0.4%	0.0%	58.3%
Broome	WA	**0.3%**	0.4%	-0.1%	123.8%
Kempsey	NSW	**0.3%**	0.2%	0.4%	-25.0%
Hepburn	VIC	**0.3%**	0.5%	-0.6%	200.0%
Mount Alexander	VIC	**0.3%**	0.5%	-0.7%	-17.8%
Denmark	WA	**0.3%**	0.2%	0.2%	15.3%
Mansfield	VIC	**0.3%**	0.4%	-0.2%	-34.2%

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* a positive share of Net Regional-Regional Migration indicates the LGA experienced a net inflow of people from other regions; the percentage listed is the percent this LGA's outflows represents out of the sum of inflows to all LGAs that experienced a net inflow of people from other regions. See p 19 on the Appendix A4 for definitions and methodology.

A2: All LGAs

Share of Migration, Changes in Total Net Internal Migration

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Campaspe	VIC	**0.3%**	0.5%	-0.7%	-18.3%
Greater Hume Shire	NSW	**0.3%**	0.1%	0.6%	230.4%
Barossa	SA	**0.3%**	0.4%	-0.3%	-33.0%
Wangaratta	VIC	**0.3%**	0.3%	0.0%	-24.5%
Bridgetown-Greenbushes	WA	**0.3%**	0%	0%	180%
West Tamar	TAS	**0.3%**	0%	0%	-17%
Yankalilla	SA	**0.2%**	0%	0%	63%
Kangaroo Island	SA	**0.2%**	0%	0%	-15%
Northampton	WA	**0.2%**	0%	1%	61%
Toodyay	WA	**0.2%**	0%	0%	-4%
Dungog	NSW	**0.2%**	0%	0%	55%
Waroona	WA	**0.2%**	0.2%	0.2%	21.2%

LGA	State	Share of TOTAL NIM (%)	Share of NET C2R Migration (%)	Share* of NET R2R Migration (%)	12 months to Sep 2025 vs 12 months to Sep 2024 (%)
Murrindindi	VIC	**0.2%**	0.3%	-0.3%	87.9%
Waratah/Wynyard	TAS	**0.2%**	0.1%	0.6%	90.6%
Queenscliffe	VIC	**0.2%**	0.2%	0.1%	-25.6%
Yorke Peninsula	SA	**0.2%**	0.2%	0.1%	-4.8%
Exmouth	WA	**0.2%**	0.2%	0.1%	-9.1%
Mitchell	VIC	**0.2%**	0.7%	-1.7%	-7.8%
Southern Midlands	TAS	**0.2%**	0.3%	-0.1%	18.8%
Light	SA	**0.2%**	0.2%	-0.1%	-21.4%
Glamorgan/Spring Bay	TAS	**0.2%**	0.1%	0.2%	54.3%
Loxton Waikerie	SA	**0.2%**	0.1%	0.2%	173.7%
Bathurst Regional	NSW	**0.2%**	0.3%	-0.3%	13.3%
East Arnhem	NT	**0.2%**	0.0%	0.5%	142.9%

* a negative share of Net Regional-Regional Migration indicates the LGA experienced a net outflow of people to other regions; the percentage listed is the percent this LGA's outflows represents out of the sum of outflows from all LGAs that experienced a net outflow of people to other regions

* a positive share of Net Regional-Regional Migration indicates the LGA experienced a net inflow of people from other regions; the percentage listed is the percent this LGA's outflows represents out of the sum of inflows to all LGAs that experienced a net inflow of people from other regions. See p 19 on the Appendix A4 for definitions and methodology.

A4: Note on methodology
Net migration and population growth

The Regional Movers Index publication was established at the height of the COVID-19 pandemic to answer the pertinent question at the time: were capital city people fleeing to the regions? The RMI showed this to be well and truly the case. It also highlighted that regional people were tending to stay in regions and avoid those severe capital-city lockdowns.

Now that Australia is living with COVID and population flows from regions to capitals have resumed, the RMI publication is honing its focus to understand the **NET** migration inflows that Australia's regions are continuing to experience. That is, the RMI is now not only considering the one-way flow of population movements from capitals to regions, but it is also considering the population movements in the other direction, by focusing on net flows. The RMI publication is also now considering the breakdown of net migration flows into the various regional LGAs: net migration from capital cities and net migration from other regions. Together, this provides an invaluable source of information on a key driver of local population changes: net internal migration.

A region's population will change according to changes in:

- Its **natural increase** – local births minus deaths
- Its **net overseas migration** – overseas people moving in minus local people moving overseas
- Its **net internal migration** – people from other regions (within Australia) moving in minus local people moving to other regions (within Australia)
- Calculated as:
  Total Net internal migration = Net flows (inflows - outflows) from Capital to Region + Net flows (inflows - outflows) from Region to Region

The RMI's reporting on net internal migration sheds much-needed light on this notorious swing variable underneath total population changes. It will also provide policymakers, industry and communities with the added understanding of local population dynamics driven by capital city versus regional migration patterns.

A4: Note on methodology
Ranking the Top Five LGAs

In considering net internal migration – and its constituent parts of net migration from capitals and net migration from other regions – this edition of the RMI ranks regions accordingly, i.e. based on:

(1) Total Net Internal Migration – the report identifies the top five regional local government areas receiving the largest net internal migration inflows (irrespective of whether these inflows are from capitals or other regions) during the 12 months to the September quarter 2025. It also identifies the top five regional LGAs that have experienced the most significant growth in net internal migration inflows (again, irrespective of whether these inflows are from capitals or other regions).

(2) Net Capital-to-Regional Migration – the report identifies the top five regional LGAs receiving the largest net migration inflows **from capital cities**. It does so by identifying and ranking the regions that have received the greatest share of total net migration inflows from all capitals to all regional LGAs. It also identifies the top five regional LGAs that have experienced the most significant growth in net migration inflows from capital cities.

(3) Net Region-to-Region Migration – the report identifies the top five regional LGAs receiving the largest net migration inflows ***from regional areas***. It does so by identifying the regions that have experienced the greatest share of total net migration inflows ***among the regional LGAs that have experienced net inflows.*** The report also identifies the top five regional LGAs that have experienced the most significant growth in net migration inflows from regional areas.

Regarding the ranking of regions experiencing the most significant growth in net migration inflows, the RMI has sought to filter out – and not include in the rankings – significant outlier results due to changes in small numbers. There are many regional LGAs with small populations prone to experiencing small net internal migration flows and therefore large percentage changes in growth rates. These places are not included in the RMI rankings. Specifically, an LGA must meet two criteria to be considered and ranked in the RMI publication:

1. The LGA must have experienced total net internal migration inflows in the previous 12 months of 50 or more people
2. The LGA must have experienced net internal migration inflows from either capitals or other regions of more than 10 people in the base period. Specifically:
   a) LGAs where the net migration **inflows from either capitals or regions were 10 people or less in the base period** were not ranked among the regions experiencing the most significant growth in total net migration inflows.

   b) LGAs where the net migration **inflows from capitals were 10 people or less in the base period** were not ranked among the regions experiencing the most significant growth in net migration **inflows from capitals.**

   c) And LGAs where the net **migration inflows from other regions were 10 people or less in the base period** were not ranked among the regions experiencing the most significant growth in net migration inflows **from regions**.

A4: Note on methodology

Definitions of inter-regional, inter-capital, region-to-capital and capital-to-region migration

The Regional Movers Index publication focuses on migration (as indicated by CBA customer relocations) from capital cities to regions. Specifically, the relocations from capital-city Local Government Areas to regional LGAs. Since December 2022 the publication also considers (but previously hadn't focused on) migration in the other direction – from regional LGAs to capital-city LGAs. These relocations must be between different LGAs (with some exceptions noted in Appendix A1).

Other relocations that occur during any given quarter are those within and between capital-cities and also those within and between regions. In addition to relocations between different LGAs, a significant number of relocations in any given quarter are within a given LGA – households changing their homes, but remaining within their overall community.

Until December 2022 the RMI publication included these relocations within its overall analytical framework. Including these gives a higher number of relocations than excluding them and this influences the numbers in the RMI report up to that issue showing the shares that each type of relocation accounts for out of all relocations. These shares are highlighted typically at the beginning of each quarter's publication (see. Table, **Breakdown of total internal migration** on p3 of December 2022 edition). Under that analytical framework, of all relocations:

- those within regional Australia have accounted for roughly 22 per cent;
- those from regional Australia to capitals have accounted for around 4 per cent;
- those from capitals to regional Australia have accounted for around 6 per cent, and
- those within and between capitals have accounted for around 68 per cent each quarter.

From December 2022 the Regional Movers Index publication includes additional detailed analysis on inter-regional migration – migration within and between Australia's regions. This is to provide an indication of another key source of population growth at the LGA level (beyond the inflows from capital-city LGAs). Relocations within a given regional LGA will not affect that LGA's overall population, and excluding these moves does not affect the RMI analysis of capital to regional flows or regional to capital flows. To get more accurate results of relocations between regions, the RMI now uses a revised analytical framework to **exclude** relocations that occur within any given LGA. We have applied this framework across the relevant elements of the publication for internal consistency. Under this revised analytical framework, we are analysing fewer but what might be called major relocations (see Table, **Breakdown of total major relocations** of p3 of this edition). Reducing the base number of relocations has changed the relative shares:

- those within regional Australia account for roughly 13 per cent;
- those from regional Australia to capitals account for around 10 per cent;
- those from capitals to regional Australia account for around 11 per cent, and
- those within and between capitals account for around 66 per cent this latest quarter.

Rebasing the analysis does not change the historical pattern of **capital city to regional** flows or **regional to capital** flows that underpin the RMI net migration index.